New Client Organizer

Welcome to LaviCPA. This tells us who you are and what you need. It takes about 15 minutes.

Please don't write Social Security numbers on this form. We'll collect them securely through the LaviCPA Client Portal.

You

YOUR FULL NAME

DATE OF BIRTH

OCCUPATION

MOBILE PHONE

EMAIL

HOME ADDRESS

CITY, STATE, ZIP

Your spouse, if married

SPOUSE'S FULL NAME

DATE OF BIRTH

OCCUPATION

MOBILE PHONE

EMAIL

Filing

MARITAL STATUS AT YEAR-END Choose

LAST TAX YEAR YOU FILED

WHO PREPARED YOUR LAST RETURN

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Your household and income.

Children and other dependents

NAME	DATE OF BIRTH	RELATIONSHIP	MONTHS LIVED WITH YOU

What applies to you

Tick everything that applies to you or your spouse.

- ☐ Wages from a job (W-2)
- ☐ Self-employed or freelance income
- ☐ Own a business (LLC, S corp, partnership)
- ☐ Own rental property
- ☐ Bought or sold real estate this year
- ☐ Short-term rental (Airbnb, Vrbo)
- ☐ Stocks, funds, or brokerage accounts
- ☐ Crypto
- ☐ Retirement account withdrawals or pension
- ☐ Social Security benefits
- ☐ K-1s from partnerships, S corps, or trusts
- ☐ Accounts or assets outside the U.S.
- ☐ Farm or orchard
- ☐ Household employee, such as a nanny
- ☐ Paid estimated tax this year
- ☐ Received a letter from the IRS or FTB

Open letters from tax agencies

ANY LETTER YOU HAVEN'T ANSWERED? Choose If yes, send it to us right away.

WHICH AGENCY Choose

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What you'd like from us, and what to send.

What you'd like help with

- Preparing tax returns
- Tax planning during the year
- Real estate strategy (cost seg, 1031)
- An IRS or FTB notice or audit
- Setting up or changing a business entity
- Bookkeeping or payroll
- Retirement and estate planning
- A second look at a past return

Your goals, in your own words

HOW DID YOU HEAR ABOUT US? Choose

WHO REFERRED YOU?

Send with this organizer

- Your last three years of federal and California returns
- Any open IRS or FTB letters
- Last year's year-end documents, if you have them